



# Acalanes Union High School District

Human Resources

1212 Pleasant Hill Road, Lafayette, CA 94549

925-280-3900 x 6623 ♦ Fax 925-280-4282

## COACH – Payroll packet

Please fill out and sign all new hire paperwork completely.

You can complete these forms on your own computer. To move from field to field, use the Tab Key. Duplicated fields will be automatically populated with your previous entries. Print your completed forms for submission to Human Resources

- Personnel & Payroll Data Sheet
- Form W4 for Federal Taxes: fill out all spaces 1-7. ***Please list # of allowances on #5 and signature at bottom of form***
- State of California EDD Form – for California State Taxes. ***Please list number of allowance on #1 and signature.***
- Supply current TB clearance
- Notice of Exclusion from CalPERS Membership. Fill out spaces 1-9 and signature at bottom of form.
- If you are currently a STRs or PERs member, complete the CALSTRS Retirement System Election accordingly.
- Oath of Allegiance
- Read Use of Social Media
- Read the Drug and Alcohol-Free Workplace Notice to Employees.
- Read Time of Hire Pamphlet for Worker's Compensation. If you choose to pre-designate your personal physician, please complete the attached form.
- Form I-9 Employment Eligibility Verification: ***Separately download, complete and print the attached file shown at the bottom of this screen.*** Fill out section 1 completely and sign. ***Must provide copies of qualifying documents from List A or combination from List B and C.*** E-verification will be completed.

Return completed documents to:

Human Resources

Acalanes Union High School District

1212 Pleasant Hill Road

Lafayette, CA 94549

[classifiedhr@acalanes.k12.ca.us](mailto:classifiedhr@acalanes.k12.ca.us)

*We educate every student to excel and contribute in a global society*



## Personnel & Payroll Data Sheet

Name: \_\_\_\_\_  
Last First Middle

Social Security No.: \_\_\_\_\_ Birth Date: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: CA Zip: \_\_\_\_\_

Mailing Address  
(If different) \_\_\_\_\_ City: \_\_\_\_\_ State: CA Zip: \_\_\_\_\_

Telephone No: \_\_\_\_\_ Optional No: ( ) \_\_\_\_\_

School/Department/Location: \_\_\_\_\_ Job Title: \_\_\_\_\_

Emergency Contact  
Information: \_\_\_\_\_ ( ) \_\_\_\_\_  
Name Phone Number Relationship

### Marital Status

Single ☐

Divorced ☐

Female ☐

Married ☐

Widowed ☐

Male ☐

\* This information is required in compliance with federal guidelines.

### Ethnicity\* (Select one):

☐ Hispanic or Latino

☐ Not Hispanic or Latino

### Race\* (Select one or more, regardless of Ethnicity):

☐ American Indian/Alaskan Native

☐ Native Hawaiian or Other Pacific Islander (Please Specify):

☐ Asian (please specify):

☐ Chinese (A)

☐ Hawaiian (O)

☐ Korean (C)

☐ Samoan (Q)

☐ Asian Indian (E)

☐ Guamanian (P)

☐ Cambodian (G)

☐ Tahitian (R)

☐ Japanese (B)

☐ Other Pacific Islander (S) \_\_\_\_\_

☐ Vietnamese (D)

☐ Hispanic or Latino (5)

☐ Laotian (F)

☐ Black or African American (6)

☐ Hmong (I)

☐ White (7)

☐ Filipino (4)

☐ Other Asian (H) \_\_\_\_\_

### Employee Directory (distributed to all employees in the District each year):

List home phone number in Employee Directory? Yes ☐ No ☐

List address in Employee Directory? Yes ☐ No ☐

Spouse/Significant Other's Name: \_\_\_\_\_ List in Employee Directory? Yes ☐ No ☐

- Tuberculosis testing is required for all school employees. You must submit a TB verification before your first day of work.
- Fingerprint clearance is required for all employees in the Acalanes Union High School District.

# Form W-4 (2015)

**Purpose.** Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

**Exemption from withholding.** If you are exempt, complete **only** lines 1, 2, 3, 4, and 7 and sign the form to validate it. Your exemption for 2015 expires February 16, 2016. See Pub. 505, Tax Withholding and Estimated Tax.

**Note.** If another person can claim you as a dependent on his or her tax return, you cannot claim exemption from withholding if your income exceeds \$1,050 and includes more than \$350 of unearned income (for example, interest and dividends).

**Exceptions.** An employee may be able to claim exemption from withholding even if the employee is a dependent, if the employee:

- Is age 65 or older,
- Is blind, or
- Will claim adjustments to income; tax credits; or itemized deductions, on his or her tax return.

The exceptions do not apply to supplemental wages greater than \$1,000,000.

**Basic instructions.** If you are not exempt, complete the **Personal Allowances Worksheet** below. The worksheets on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earners/multiple jobs situations.

Complete all worksheets that apply. However, you may claim fewer (or zero) allowances. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

**Head of household.** Generally, you can claim head of household filing status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependent(s) or other qualifying individuals. See Pub. 501, Exemptions, Standard Deduction, and Filing Information, for information.

**Tax credits.** You can take projected tax credits into account in figuring your allowable number of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the **Personal Allowances Worksheet** below. See Pub. 505 for information on converting your other credits into withholding allowances.

**Nonwage income.** If you have a large amount of nonwage income, such as interest or dividends, consider making estimated tax payments using Form 1040-ES, Estimated Tax for Individuals. Otherwise, you may owe additional tax. If you have pension or annuity income, see Pub. 505 to find out if you should adjust your withholding on Form W-4 or W-4P.

**Two earners or multiple jobs.** If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withholding usually will be most accurate when all allowances are claimed on the Form W-4 for the highest paying job and zero allowances are claimed on the others. See Pub. 505 for details.

**Nonresident alien.** If you are a nonresident alien, see Notice 1392, Supplemental Form W-4 Instructions for Nonresident Aliens, before completing this form.

**Check your withholding.** After your Form W-4 takes effect, use Pub. 505 to see how the amount you are having withheld compares to your projected total tax for 2015. See Pub. 505, especially if your earnings exceed \$130,000 (Single) or \$180,000 (Married).

**Future developments.** Information about any future developments affecting Form W-4 (such as legislation enacted after we release it) will be posted at [www.irs.gov/w4](http://www.irs.gov/w4).

## Personal Allowances Worksheet (Keep for your records.)

|                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|----------------|
| <b>A</b>                                                                                                                                                                                                                                                                                           | Enter "1" for <b>yourself</b> if no one else can claim you as a dependent . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <b>A</b> _____                                                                                                                                                            |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| <b>B</b>                                                                                                                                                                                                                                                                                           | Enter "1" if: <table><tr><td>• You are single and have only one job; or</td><td rowspan="3">} . . . . .</td></tr><tr><td>• You are married, have only one job, and your spouse does not work; or</td></tr><tr><td>• Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less.</td></tr></table>                                                                                                                                                                                                                                                                                                                                                                                                        | • You are single and have only one job; or                                                                                                                                | } . . . . .                                                                                                                                                                                                                                                                                        | • You are married, have only one job, and your spouse does not work; or                                                             | • Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less. | <b>B</b> _____ |
| • You are single and have only one job; or                                                                                                                                                                                                                                                         | } . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| • You are married, have only one job, and your spouse does not work; or                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| • Your wages from a second job or your spouse's wages (or the total of both) are \$1,500 or less.                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| <b>C</b>                                                                                                                                                                                                                                                                                           | Enter "1" for your <b>spouse</b> . But, you may choose to enter "-0-" if you are married and have either a working spouse or more than one job. (Entering "-0-" may help you avoid having too little tax withheld.) . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | <b>C</b> _____                                                                                                                                                            |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| <b>D</b>                                                                                                                                                                                                                                                                                           | Enter number of <b>dependents</b> (other than your spouse or yourself) you will claim on your tax return . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | <b>D</b> _____                                                                                                                                                            |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| <b>E</b>                                                                                                                                                                                                                                                                                           | Enter "1" if you will file as <b>head of household</b> on your tax return (see conditions under <b>Head of household</b> above) . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <b>E</b> _____                                                                                                                                                            |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| <b>F</b>                                                                                                                                                                                                                                                                                           | Enter "1" if you have at least \$2,000 of <b>child or dependent care expenses</b> for which you plan to claim a credit . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>F</b> _____                                                                                                                                                            |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| <b>G</b>                                                                                                                                                                                                                                                                                           | <b>Child Tax Credit</b> (including additional child tax credit). See Pub. 972, Child Tax Credit, for more information.<br>• If your total income will be less than \$65,000 (\$100,000 if married), enter "2" for each eligible child; then <b>less</b> "1" if you have two to four eligible children or <b>less</b> "2" if you have five or more eligible children.<br>• If your total income will be between \$65,000 and \$84,000 (\$100,000 and \$119,000 if married), enter "1" for each eligible child . . . . .                                                                                                                                                                                                                       | <b>G</b> _____                                                                                                                                                            |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| <b>H</b>                                                                                                                                                                                                                                                                                           | Add lines A through G and enter total here. ( <b>Note.</b> This may be different from the number of exemptions you claim on your tax return.) ►                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | <b>H</b> _____                                                                                                                                                            |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
|                                                                                                                                                                                                                                                                                                    | For accuracy, <b>complete all worksheets that apply.</b> <table><tr><td>• If you plan to <b>itemize</b> or <b>claim adjustments to income</b> and want to reduce your withholding, see the <b>Deductions and Adjustments Worksheet</b> on page 2.</td></tr><tr><td>• If you are <b>single and have more than one job</b> or are <b>married and you and your spouse both work</b> and the combined earnings from all jobs exceed \$50,000 (\$20,000 if married), see the <b>Two-Earners/Multiple Jobs Worksheet</b> on page 2 to avoid having too little tax withheld.</td></tr><tr><td>• If <b>neither</b> of the above situations applies, <b>stop here</b> and enter the number from line H on line 5 of Form W-4 below.</td></tr></table> | • If you plan to <b>itemize</b> or <b>claim adjustments to income</b> and want to reduce your withholding, see the <b>Deductions and Adjustments Worksheet</b> on page 2. | • If you are <b>single and have more than one job</b> or are <b>married and you and your spouse both work</b> and the combined earnings from all jobs exceed \$50,000 (\$20,000 if married), see the <b>Two-Earners/Multiple Jobs Worksheet</b> on page 2 to avoid having too little tax withheld. | • If <b>neither</b> of the above situations applies, <b>stop here</b> and enter the number from line H on line 5 of Form W-4 below. |                                                                                                   |                |
| • If you plan to <b>itemize</b> or <b>claim adjustments to income</b> and want to reduce your withholding, see the <b>Deductions and Adjustments Worksheet</b> on page 2.                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| • If you are <b>single and have more than one job</b> or are <b>married and you and your spouse both work</b> and the combined earnings from all jobs exceed \$50,000 (\$20,000 if married), see the <b>Two-Earners/Multiple Jobs Worksheet</b> on page 2 to avoid having too little tax withheld. |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |
| • If <b>neither</b> of the above situations applies, <b>stop here</b> and enter the number from line H on line 5 of Form W-4 below.                                                                                                                                                                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                    |                                                                                                                                     |                                                                                                   |                |

----- Separate here and give Form W-4 to your employer. Keep the top part for your records. -----

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |  |                                                                                                                                                                                                                                                              |  |                                                |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|------------------------------------------------|
| <b>Form W-4</b><br>Department of the Treasury<br>Internal Revenue Service                                                                                                                                                                                                                                                                                                                                                                                                |  | <b>Employee's Withholding Allowance Certificate</b>                                                                                                                                                                                                          |  | OMB No. 1545-0074                              |
| ► <b>Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.</b>                                                                                                                                                                                                                                                           |  |                                                                                                                                                                                                                                                              |  | <b>2015</b>                                    |
| <b>1</b> Your first name and middle initial                                                                                                                                                                                                                                                                                                                                                                                                                              |  | Last name                                                                                                                                                                                                                                                    |  | <b>2</b> Your social security number           |
| Home address (number and street or rural route)                                                                                                                                                                                                                                                                                                                                                                                                                          |  | <b>3</b> <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate.<br><b>Note.</b> If married, but legally separated, or spouse is a nonresident alien, check the "Single" box. |  |                                                |
| City or town, state, and ZIP code                                                                                                                                                                                                                                                                                                                                                                                                                                        |  | <b>4</b> If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card. ► <input type="checkbox"/>                                                                                 |  |                                                |
| <b>5</b> Total number of allowances you are claiming (from line <b>H</b> above <b>or</b> from the applicable worksheet on page 2)                                                                                                                                                                                                                                                                                                                                        |  | <b>5</b>                                                                                                                                                                                                                                                     |  |                                                |
| <b>6</b> Additional amount, if any, you want withheld from each paycheck . . . . .                                                                                                                                                                                                                                                                                                                                                                                       |  | <b>6</b>                                                                                                                                                                                                                                                     |  | \$                                             |
| <b>7</b> I claim exemption from withholding for 2015, and I certify that I meet <b>both</b> of the following conditions for exemption.<br>• Last year I had a right to a refund of <b>all</b> federal income tax withheld because I had <b>no</b> tax liability, <b>and</b><br>• This year I expect a refund of <b>all</b> federal income tax withheld because I expect to have <b>no</b> tax liability.<br>If you meet both conditions, write "Exempt" here . . . . . ► |  | <b>7</b>                                                                                                                                                                                                                                                     |  |                                                |
| Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.                                                                                                                                                                                                                                                                                                              |  |                                                                                                                                                                                                                                                              |  |                                                |
| <b>Employee's signature</b><br>(This form is not valid unless you sign it.) ►                                                                                                                                                                                                                                                                                                                                                                                            |  |                                                                                                                                                                                                                                                              |  |                                                |
| <b>8</b> Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.)                                                                                                                                                                                                                                                                                                                                                                     |  | <b>9</b> Office code (optional)                                                                                                                                                                                                                              |  | <b>10</b> Employer identification number (EIN) |

**Deductions and Adjustments Worksheet****Note.** Use this worksheet *only* if you plan to itemize deductions or claim certain credits or adjustments to income.

|           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |           |    |       |
|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|----|-------|
| <b>1</b>  | Enter an estimate of your 2015 itemized deductions. These include qualifying home mortgage interest, charitable contributions, state and local taxes, medical expenses in excess of 10% (7.5% if either you or your spouse was born before January 2, 1951) of your income, and miscellaneous deductions. For 2015, you may have to reduce your itemized deductions if your income is over \$309,900 and you are married filing jointly or are a qualifying widow(er); \$284,050 if you are head of household; \$258,250 if you are single and not head of household or a qualifying widow(er); or \$154,950 if you are married filing separately. See Pub. 505 for details . . . . . | <b>1</b>  | \$ | _____ |
| <b>2</b>  | Enter: $\left\{ \begin{array}{l} \$12,600 \text{ if married filing jointly or qualifying widow(er)} \\ \$9,250 \text{ if head of household} \\ \$6,300 \text{ if single or married filing separately} \end{array} \right\}$ . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <b>2</b>  | \$ | _____ |
| <b>3</b>  | <b>Subtract</b> line 2 from line 1. If zero or less, enter “-0-” . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <b>3</b>  | \$ | _____ |
| <b>4</b>  | Enter an estimate of your 2015 adjustments to income and any additional standard deduction (see Pub. 505) . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <b>4</b>  | \$ | _____ |
| <b>5</b>  | <b>Add</b> lines 3 and 4 and enter the total. (Include any amount for credits from the <i>Converting Credits to Withholding Allowances for 2015 Form W-4</i> worksheet in Pub. 505.) . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | <b>5</b>  | \$ | _____ |
| <b>6</b>  | Enter an estimate of your 2015 nonwage income (such as dividends or interest) . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | <b>6</b>  | \$ | _____ |
| <b>7</b>  | <b>Subtract</b> line 6 from line 5. If zero or less, enter “-0-” . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | <b>7</b>  | \$ | _____ |
| <b>8</b>  | <b>Divide</b> the amount on line 7 by \$4,000 and enter the result here. Drop any fraction . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>8</b>  |    | _____ |
| <b>9</b>  | Enter the number from the <b>Personal Allowances Worksheet</b> , line H, page 1 . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <b>9</b>  |    | _____ |
| <b>10</b> | <b>Add</b> lines 8 and 9 and enter the total here. If you plan to use the <b>Two-Earners/Multiple Jobs Worksheet</b> , also enter this total on line 1 below. Otherwise, <b>stop here</b> and enter this total on Form W-4, line 5, page 1 . . . . .                                                                                                                                                                                                                                                                                                                                                                                                                                  | <b>10</b> |    | _____ |

**Two-Earners/Multiple Jobs Worksheet (See *Two earners or multiple jobs* on page 1.)****Note.** Use this worksheet *only* if the instructions under line H on page 1 direct you here.

|                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                                           |          |          |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| <b>1</b>                                                                                                                                                                                                         | Enter the number from line H, page 1 (or from line 10 above if you used the <b>Deductions and Adjustments Worksheet</b> ) . . . . .                                                                                                                                                                                                                       | <b>1</b> | _____    |
| <b>2</b>                                                                                                                                                                                                         | Find the number in <b>Table 1</b> below that applies to the <b>LOWEST</b> paying job and enter it here. <b>However</b> , if you are married filing jointly and wages from the highest paying job are \$65,000 or less, do not enter more than “3” . . . . .                                                                                               | <b>2</b> | _____    |
| <b>3</b>                                                                                                                                                                                                         | If line 1 is <b>more than or equal to</b> line 2, subtract line 2 from line 1. Enter the result here (if zero, enter “-0-”) and on Form W-4, line 5, page 1. <b>Do not</b> use the rest of this worksheet . . . . .                                                                                                                                       | <b>3</b> | _____    |
| <b>Note.</b> If line 1 is <b>less than</b> line 2, enter “-0-” on Form W-4, line 5, page 1. Complete lines 4 through 9 below to figure the additional withholding amount necessary to avoid a year-end tax bill. |                                                                                                                                                                                                                                                                                                                                                           |          |          |
| <b>4</b>                                                                                                                                                                                                         | Enter the number from line 2 of this worksheet . . . . .                                                                                                                                                                                                                                                                                                  | <b>4</b> | _____    |
| <b>5</b>                                                                                                                                                                                                         | Enter the number from line 1 of this worksheet . . . . .                                                                                                                                                                                                                                                                                                  | <b>5</b> | _____    |
| <b>6</b>                                                                                                                                                                                                         | <b>Subtract</b> line 5 from line 4 . . . . .                                                                                                                                                                                                                                                                                                              | <b>6</b> | _____    |
| <b>7</b>                                                                                                                                                                                                         | Find the amount in <b>Table 2</b> below that applies to the <b>HIGHEST</b> paying job and enter it here . . . . .                                                                                                                                                                                                                                         | <b>7</b> | \$ _____ |
| <b>8</b>                                                                                                                                                                                                         | <b>Multiply</b> line 7 by line 6 and enter the result here. This is the additional annual withholding needed . . . . .                                                                                                                                                                                                                                    | <b>8</b> | \$ _____ |
| <b>9</b>                                                                                                                                                                                                         | Divide line 8 by the number of pay periods remaining in 2015. For example, divide by 25 if you are paid every two weeks and you complete this form on a date in January when there are 25 pay periods remaining in 2015. Enter the result here and on Form W-4, line 6, page 1. This is the additional amount to be withheld from each paycheck . . . . . | <b>9</b> | \$ _____ |

**Table 1**

| Married Filing Jointly                      |                       | All Others                                  |                       |
|---------------------------------------------|-----------------------|---------------------------------------------|-----------------------|
| If wages from <b>LOWEST</b> paying job are— | Enter on line 2 above | If wages from <b>LOWEST</b> paying job are— | Enter on line 2 above |
| \$0 - \$6,000                               | 0                     | \$0 - \$8,000                               | 0                     |
| 6,001 - 13,000                              | 1                     | 8,001 - 17,000                              | 1                     |
| 13,001 - 24,000                             | 2                     | 17,001 - 26,000                             | 2                     |
| 24,001 - 26,000                             | 3                     | 26,001 - 34,000                             | 3                     |
| 26,001 - 34,000                             | 4                     | 34,001 - 44,000                             | 4                     |
| 34,001 - 44,000                             | 5                     | 44,001 - 75,000                             | 5                     |
| 44,001 - 50,000                             | 6                     | 75,001 - 85,000                             | 6                     |
| 50,001 - 65,000                             | 7                     | 85,001 - 110,000                            | 7                     |
| 65,001 - 75,000                             | 8                     | 110,001 - 125,000                           | 8                     |
| 75,001 - 80,000                             | 9                     | 125,001 - 140,000                           | 9                     |
| 80,001 - 100,000                            | 10                    | 140,001 and over                            | 10                    |
| 100,001 - 115,000                           | 11                    |                                             |                       |
| 115,001 - 130,000                           | 12                    |                                             |                       |
| 130,001 - 140,000                           | 13                    |                                             |                       |
| 140,001 - 150,000                           | 14                    |                                             |                       |
| 150,001 and over                            | 15                    |                                             |                       |

**Table 2**

| Married Filing Jointly                       |                       | All Others                                   |                       |
|----------------------------------------------|-----------------------|----------------------------------------------|-----------------------|
| If wages from <b>HIGHEST</b> paying job are— | Enter on line 7 above | If wages from <b>HIGHEST</b> paying job are— | Enter on line 7 above |
| \$0 - \$75,000                               | \$600                 | \$0 - \$38,000                               | \$600                 |
| 75,001 - 135,000                             | 1,000                 | 38,001 - 83,000                              | 1,000                 |
| 135,001 - 205,000                            | 1,120                 | 83,001 - 180,000                             | 1,120                 |
| 205,001 - 360,000                            | 1,320                 | 180,001 - 395,000                            | 1,320                 |
| 360,001 - 405,000                            | 1,400                 | 395,001 and over                             | 1,580                 |
| 405,001 and over                             | 1,580                 |                                              |                       |

**Privacy Act and Paperwork Reduction Act Notice.** We ask for the information on this form to carry out the Internal Revenue laws of the United States. Internal Revenue Code sections 3402(f)(2) and 6109 and their regulations require you to provide this information; your employer uses it to determine your federal income tax withholding. Failure to provide a properly completed form will result in your being treated as a single person who claims no withholding allowances; providing fraudulent information may subject you to penalties. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation; to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws; and to the Department of Health and Human Services for use in the National Directory of New Hires. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by Code section 6103.

The average time and expenses required to complete and file this form will vary depending on individual circumstances. For estimated averages, see the instructions for your income tax return.

If you have suggestions for making this form simpler, we would be happy to hear from you. See the instructions for your income tax return.

## EMPLOYEE'S WITHHOLDING ALLOWANCE CERTIFICATE

|                                                 |                                                                                                                                                                      |
|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type or Print Your Full Name                    | Your Social Security Number                                                                                                                                          |
| Home Address (Number and Street or Rural Route) | Filing Status Withholding Allowances                                                                                                                                 |
| City, State, and ZIP Code                       | <input type="checkbox"/> SINGLE or MARRIED (with two or more incomes)<br><input type="checkbox"/> MARRIED (one income)<br><input type="checkbox"/> HEAD OF HOUSEHOLD |

- Number of allowances for Regular Withholding Allowances, Worksheet A \_\_\_\_\_  
 Number of allowances from the Estimated Deductions, Worksheet B \_\_\_\_\_  
 Total Number of Allowances (A + B) when using the California Withholding Schedules for 2013 \_\_\_\_\_  
 OR
- Additional amount of state income tax to be withheld each pay period (if employer agrees), Worksheet C \_\_\_\_\_  
 OR
- I certify under penalty of perjury that I am not subject to California withholding. I meet the conditions set forth under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act. (Check box here) ☐

***Under the penalties of perjury, I certify that the number of withholding allowances claimed on this certificate does not exceed the number to which I am entitled or, if claiming exemption from withholding, that I am entitled to claim the exempt status.***

Signature \_\_\_\_\_ Date \_\_\_\_\_

|                             |                                    |
|-----------------------------|------------------------------------|
| Employer's Name and Address | California Employer Account Number |
|-----------------------------|------------------------------------|

----- cut here -----

Give the top portion of this page to your employer and keep the remainder for your records.

### **YOUR CALIFORNIA PERSONAL INCOME TAX MAY BE UNDERWITHHELD IF YOU DO NOT FILE THIS DE 4 FORM.**

***IF YOU RELY ON THE FEDERAL FORM W-4 FOR YOUR CALIFORNIA WITHHOLDING ALLOWANCES, YOUR CALIFORNIA STATE PERSONAL INCOME TAX MAY BE UNDERWITHHELD AND YOU MAY OWE MONEY AT THE END OF THE YEAR.***

**PURPOSE:** This certificate, DE 4, is for **California Personal Income Tax (PIT) withholding** purposes only. The DE 4 is used to compute the amount of taxes to be withheld from your wages, by your employer, to accurately reflect your state tax withholding obligation.

You should complete this form if either:

- (1) You claim a different marital status, number of regular allowances, or different additional dollar amount to be withheld for California PIT withholding than you claim for federal income tax withholding or,
- (2) You claim additional allowances for estimated deductions.

**THIS FORM WILL NOT CHANGE YOUR FEDERAL WITHHOLDING ALLOWANCES.**

The federal Form W-4 is applicable for California withholding purposes if you wish to claim the same marital status, number of regular allowances, and/or the same additional dollar amount to be withheld for state and federal purposes. However, federal tax brackets and withholding methods do not reflect state PIT withholding tables. **If you rely on the number of withholding**

**allowances you claim on your Form W-4 withholding allowance certificate for your state income tax withholding, you may be significantly underwithheld.** This is particularly true if your household income is derived from more than one source.

**CHECK YOUR WITHHOLDING:** After your Form W-4 and/or DE 4 takes effect, compare the state income tax withheld with your estimated total annual tax. For state withholding, use the worksheets on this form, and for federal withholding use the Internal Revenue Service (IRS) Publication 919 or federal withholding calculations.

**EXEMPTION FROM WITHHOLDING:** If you wish to claim exempt, complete the federal Form W-4. You may claim exempt from withholding California income tax if you did not owe any federal income tax last year and you do not expect to owe any federal income tax this year. The exemption automatically expires on February 15 of the next year. If you continue to qualify for the exempt filing status, a new Form W-4 designating EXEMPT must be submitted before February 15. If you are not having federal income tax withheld this year but expect to have a tax liability next year, the law requires you to give your employer a new Form W-4 by December 1.

**EXEMPTION FROM WITHHOLDING** (continued): Under the Service Member Civil Relief Act, as amended by the Military Spouses Residency Relief Act, you may be exempt from California income tax on your wages if (i) your spouse is a member of the armed forces present in California in compliance with military orders; (ii) you are present in California solely to be with your spouse; and (iii) you maintain your domicile in another state. If you claim exemption under this act, check the box on Line 3. You may be required to provide proof of exemption upon request.

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**IF YOU NEED MORE DETAILED INFORMATION, SEE THE INSTRUCTIONS THAT CAME WITH YOUR LAST CALIFORNIA INCOME TAX RETURN OR CALL THE FRANCHISE TAX BOARD.**

IF YOU ARE CALLING FROM WITHIN THE UNITED STATES 800-852-5711 (voice)  
800-822-6268 (TTY)

IF YOU ARE CALLING FROM OUTSIDE THE UNITED STATES (Not Toll Free) 916-845-6500

The *California Employer's Guide* (DE 44) provides the income tax withholding tables. This publication may be found on the Employment Development Department (EDD) website at [www.edd.ca.gov/Payroll\\_Taxes/Forms\\_and\\_Publications.htm](http://www.edd.ca.gov/Payroll_Taxes/Forms_and_Publications.htm). To assist you in calculating your tax liability, please visit the Franchise Tax Board website at: [www.ftb.ca.gov/individuals/index.shtml](http://www.ftb.ca.gov/individuals/index.shtml).

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**NOTIFICATION:** Your employer is required to send a copy of your DE 4 to the Franchise Tax Board (FTB) if it meets either of the following two conditions:

- You claim more than 10 withholding allowances.
- You claim exemption from state or federal income tax withholding and your employer expects your usual weekly wages to exceed \$200 per week.

IF THE IRS INSTRUCTS YOUR EMPLOYER TO WITHHOLD FEDERAL INCOME TAX BASED ON A CERTAIN WITHHOLDING STATUS, YOUR EMPLOYER IS REQUIRED TO USE THE SAME WITHHOLDING STATUS FOR STATE INCOME TAX WITHHOLDING IF YOUR WITHHOLDING ALLOWANCES FOR STATE PURPOSES MEET THE REQUIREMENTS LISTED UNDER "NOTIFICATION." IF YOU FEEL THAT THE FEDERAL DETERMINATION IS NOT CORRECT FOR STATE WITHHOLDING PURPOSES, YOU MAY REQUEST A REVIEW.

To do so, write to:

W-4 Unit  
Franchise Tax Board MS F180  
P.O. Box 2952  
Sacramento, CA 95812-2952  
Fax: 916-843-1094

Your letter should contain the basis of your request for review. You will have the burden of showing the federal determination incorrect for state withholding purposes. The FTB will limit its review to that issue. The FTB will notify both you and your employer of its findings. Your employer is then required to withhold state income tax as instructed by FTB. In the event FTB or IRS finds there is no reasonable basis for the number of withholding exemptions that you claimed on your Form W-4/DE 4, you may be subject to a penalty.

**PENALTY:** You may be fined \$500 if you file, with no reasonable basis, a DE 4 that results in less tax being withheld than is properly allowable. In addition, criminal penalties apply for willfully supplying false or fraudulent information or failing to supply information requiring an increase in withholding. This is provided for by Section 19176 of the California Revenue and Taxation Code.

## INSTRUCTIONS — 1 — ALLOWANCES\*

When determining your withholding allowances, you must consider your personal situation:

- Do you claim allowances for dependents or blindness?
- Are you going to itemize your deductions?
- Do you have more than one income coming into the household?

**TWO-EARNER/TWO-JOBS:** When earnings are derived from more than one source, underwithholding may occur. If you have a working spouse or more than one job, it is best to check the box "SINGLE or MARRIED (with two or more incomes)." Figure the total number of allowances you are entitled to claim on all jobs using only one DE 4 form. Claim allowances with one employer. Do not claim the same allowances with more than one employer. Your withholding will usually be most accurate when all allowances are claimed on the DE 4 or Form W-4 filed for the highest paying job and zero allowances are claimed for the others.

**MARRIED BUT NOT LIVING WITH YOUR SPOUSE:** You may check the "Head of Household" marital status box if you meet all of the following tests:

- (1) Your spouse will not live with you at any time during the year;
- (2) You will furnish over half of the cost of maintaining a home for the entire year for yourself and your child or stepchild who qualifies as your dependent; and
- (3) You will file a separate return for the year.

**HEAD OF HOUSEHOLD:** To qualify, you must be unmarried or legally separated from your spouse and pay more than 50% of the costs of maintaining a home for the entire year for yourself and your dependent(s) or other qualifying individuals. Cost of maintaining the home includes such items as rent, property insurance, property taxes, mortgage interest, repairs, utilities, and cost of food. It does not include the individual's personal expenses or any amount which represents value of services performed by a member of the household of the taxpayer.

### WORKSHEET A

### REGULAR WITHHOLDING ALLOWANCES

- |                                                                                                          |     |                             |
|----------------------------------------------------------------------------------------------------------|-----|-----------------------------|
| (A) Allowance for yourself — enter 1 . . . . .                                                           | (A) | <u>                    </u> |
| (B) Allowance for your spouse (if not separately claimed by your spouse) — enter 1 . . . . .             | (B) | <u>                    </u> |
| (C) Allowance for blindness — yourself — enter 1 . . . . .                                               | (C) | <u>                    </u> |
| (D) Allowance for blindness — your spouse (if not separately claimed by your spouse) — enter 1 . . . . . | (D) | <u>                    </u> |
| (E) Allowance(s) for dependent(s) — do not include yourself or your spouse . . . . .                     | (E) | <u>                    </u> |
| (F) Total — add lines (A) through (E) above . . . . .                                                    | (F) | <u>                    </u> |

## INSTRUCTIONS — 2 — ADDITIONAL WITHHOLDING ALLOWANCES

If you expect to itemize deductions on your California income tax return, you can claim additional withholding allowances. Use Worksheet B to determine whether your expected estimated deductions may entitle you to claim one or more additional withholding allowances. Use last year's FTB 540 form as a model to calculate this year's withholding amounts.

Do not include deferred compensation, qualified pension payments or flexible benefits, etc., that are deducted from your gross pay but are not taxed on this worksheet.

You may reduce the amount of tax withheld from your wages by claiming one additional withholding allowance for each \$1,000, or fraction of \$1,000, by which you expect your estimated deductions for the year to exceed your allowable standard deduction.

### WORKSHEET B

### ESTIMATED DEDUCTIONS

- |                                                                                                                                                                                                                                                                   |   |                                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---------------------------------|
| 1. Enter an estimate of your itemized deductions for California taxes for this tax year as listed in the schedules in the FTB 540 form . . . . .                                                                                                                  |   | 1. <u>                    </u>  |
| 2. Enter \$7,682 if married filing joint with two or more allowances, unmarried head of household, or qualifying widow(er) with dependent(s) or \$3,841 if single or married filing separately, dual income married, or married with multiple employers . . . . . | — | 2. <u>                    </u>  |
| 3. Subtract line 2 from line 1, enter difference . . . . .                                                                                                                                                                                                        | = | 3. <u>                    </u>  |
| 4. Enter an estimate of your adjustments to income (alimony payments, IRA deposits) . . . . .                                                                                                                                                                     | + | 4. <u>                    </u>  |
| 5. Add line 4 to line 3, enter sum . . . . .                                                                                                                                                                                                                      | = | 5. <u>                    </u>  |
| 6. Enter an estimate of your nonwage income (dividends, interest income, alimony receipts) . . . . .                                                                                                                                                              | — | 6. <u>                    </u>  |
| 7. If line 5 is greater than line 6 (if less, see below);<br>Subtract line 6 from line 5, enter difference . . . . .                                                                                                                                              | = | 7. <u>                    </u>  |
| 8. Divide the amount on line 7 by \$1,000, round any fraction to the nearest whole number . . . . .<br>Enter this number on line 1 of the DE 4. Complete Worksheet C, if needed.                                                                                  |   | 8. <u>                    </u>  |
| 9. If line 6 is greater than line 5;<br>Enter amount from line 6 (nonwage income) . . . . .                                                                                                                                                                       |   | 9. <u>                    </u>  |
| 10. Enter amount from line 5 (deductions) . . . . .                                                                                                                                                                                                               |   | 10. <u>                    </u> |
| 11. Subtract line 10 from line 9, enter difference . . . . .<br><u>Complete Worksheet C</u>                                                                                                                                                                       |   | 11. <u>                    </u> |

\*Wages paid to registered domestic partners will be treated the same for state income tax purposes as wages paid to spouses for California Personal Income Tax (PIT) withholding and PIT wages. This new law does not impact federal income tax law. A registered domestic partner means an individual partner in a domestic partner relationship within the meaning of Section 297 of the Family Code. For more information, please call our Taxpayer Assistance Center at 888-745-3886.

**WORKSHEET C**
**TAX WITHHOLDING AND ESTIMATED TAX**

1. Enter estimate of total wages for tax year 2013 . . . . . 1. \_\_\_\_\_
2. Enter estimate of nonwage income (line 6 of Worksheet B) . . . . . 2. \_\_\_\_\_
3. Add line 1 and line 2. Enter sum . . . . . 3. \_\_\_\_\_
4. Enter itemized deductions or standard deduction (line 1 or 2 of Worksheet B, whichever is largest) . . . . . 4. \_\_\_\_\_
5. Enter adjustments to income (line 4 of Worksheet B) . . . . . 5. \_\_\_\_\_
6. Add line 4 and line 5. Enter sum . . . . . 6. \_\_\_\_\_
7. Subtract line 6 from line 3. Enter difference . . . . . 7. \_\_\_\_\_
8. Figure your tax liability for the amount on line 7 by using the 2013 tax rate schedules below . . . . . 8. \_\_\_\_\_
9. Enter personal exemptions (line F of Worksheet A x \$114.40) . . . . . 9. \_\_\_\_\_
10. Subtract line 9 from line 8. Enter difference . . . . . 10. \_\_\_\_\_
11. Enter any tax credits. (See FTB Form 540) . . . . . 11. \_\_\_\_\_
12. Subtract line 11 from line 10. Enter difference. This is your total tax liability . . . . . 12. \_\_\_\_\_
13. Calculate the tax withheld and estimated to be withheld during 2013. Contact your employer to request the amount that will be withheld on your wages based on the marital status and number of withholding allowances you will claim for 2013. Multiply the estimated amount to be withheld by the number of pay periods left in the year. Add the total to the amount already withheld for 2013 . . . . . 13. \_\_\_\_\_
14. Subtract line 13 from line 12. Enter difference. If this is less than zero, you do not need to have additional taxes withheld . . . . . 14. \_\_\_\_\_
15. Divide line 14 by the number of pay periods remaining in the year. Enter this figure on line 2 of the DE 4 . . . . . 15. \_\_\_\_\_

**NOTE:** Your employer is not required to withhold the additional amount requested on line 2 of your DE 4. If your employer does not agree to withhold the additional amount, you may increase your withholdings as much as possible by using the "single" status with "zero" allowances. If the amount withheld still results in an underpayment of state income taxes, you may need to file quarterly estimates on Form 540-ES with the FTB to avoid a penalty.

*THESE TABLES ARE FOR CALCULATING WORKSHEET C AND FOR 2013 ONLY*

| SINGLE OR MARRIED WITH DUAL EMPLOYERS |                 |                      |             |              |
|---------------------------------------|-----------------|----------------------|-------------|--------------|
| IF THE TAXABLE INCOME IS              |                 | COMPUTED TAX IS      |             |              |
| OVER                                  | BUT NOT OVER    | OF AMOUNT OVER . . . | PLUS*       |              |
| \$0                                   | \$7,455 ...     | 1.100%               | \$0         | \$0.00       |
| \$7,455                               | \$17,676 ...    | 2.200%               | \$7,455     | \$82.01      |
| \$17,676                              | \$27,897 ...    | 4.400%               | \$17,676    | \$306.87     |
| \$27,897                              | \$38,726 ...    | 6.600%               | \$27,897    | \$756.59     |
| \$38,726                              | \$48,942 ...    | 8.800%               | \$38,726    | \$1,471.30   |
| \$48,942                              | \$250,000 ...   | 10.230%              | \$48,942    | \$2,370.31   |
| \$250,000                             | \$300,000 ...   | 11.330%              | \$250,000   | \$22,938.54  |
| \$300,000                             | \$500,000 ...   | 12.430%              | \$300,000   | \$28,603.54  |
| \$500,000                             | \$1,000,000 ... | 13.530%              | \$500,000   | \$53,463.54  |
| \$1,000,000                           | and over        | 14.630%              | \$1,000,000 | \$121,113.54 |

| MARRIED FILING JOINT OR QUALIFYING WIDOW(ER) TAXPAYERS |                 |                      |             |              |
|--------------------------------------------------------|-----------------|----------------------|-------------|--------------|
| IF THE TAXABLE INCOME IS                               |                 | COMPUTED TAX IS      |             |              |
| OVER                                                   | BUT NOT OVER    | OF AMOUNT OVER . . . | PLUS*       |              |
| \$0                                                    | \$14,910 ...    | 1.100%               | \$0         | \$0.00       |
| \$14,910                                               | \$35,352 ...    | 2.200%               | \$14,910    | \$164.01     |
| \$35,352                                               | \$55,794 ...    | 4.400%               | \$35,352    | \$613.73     |
| \$55,794                                               | \$77,452 ...    | 6.600%               | \$55,794    | \$1,513.18   |
| \$77,452                                               | \$97,884 ...    | 8.800%               | \$77,452    | \$2,942.61   |
| \$97,884                                               | \$500,000 ...   | 10.230%              | \$97,884    | \$4,740.63   |
| \$500,000                                              | \$600,000 ...   | 11.330%              | \$500,000   | \$45,877.10  |
| \$600,000                                              | \$1,000,000 ... | 12.430%              | \$600,000   | \$57,207.10  |
| \$1,000,000                                            | and over        | 14.630%              | \$1,000,000 | \$106,927.10 |

| UNMARRIED HEAD OF HOUSEHOLD TAXPAYERS |                 |                      |             |              |
|---------------------------------------|-----------------|----------------------|-------------|--------------|
| IF THE TAXABLE INCOME IS              |                 | COMPUTED TAX IS      |             |              |
| OVER                                  | BUT NOT OVER    | OF AMOUNT OVER . . . | PLUS*       |              |
| \$0                                   | \$14,920 ...    | 1.100%               | \$0         | \$0.00       |
| \$14,920                              | \$35,351 ...    | 2.200%               | \$14,920    | \$164.12     |
| \$35,351                              | \$45,571 ...    | 4.400%               | \$35,351    | \$613.60     |
| \$45,571                              | \$56,400 ...    | 6.600%               | \$45,571    | \$1,063.28   |
| \$56,400                              | \$66,618 ...    | 8.800%               | \$56,400    | \$1,777.99   |
| \$66,618                              | \$340,000 ...   | 10.230%              | \$66,618    | \$2,677.17   |
| \$340,000                             | \$408,000 ...   | 11.330%              | \$340,000   | \$30,644.15  |
| \$408,000                             | \$680,000 ...   | 12.430%              | \$408,000   | \$38,348.55  |
| \$680,000                             | \$1,000,000 ... | 13.530%              | \$680,000   | \$72,158.15  |
| \$1,000,000                           | and over        | 14.630%              | \$1,000,000 | \$115,454.15 |

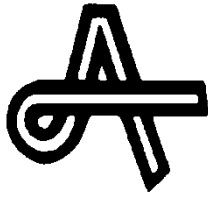
\*marginal tax

IF YOU NEED MORE DETAILED INFORMATION, SEE THE INSTRUCTIONS THAT CAME WITH YOUR LAST CALIFORNIA INCOME TAX RETURN OR CALL FRANCHISE TAX BOARD:

IF YOU ARE CALLING FROM WITHIN THE UNITED STATES 800-852-5711 (voice)  
800-822-6268 (TTY)

IF YOU ARE CALLING FROM OUTSIDE THE UNITED STATES  
(Not Toll Free) 916-845-6500

The DE 4 information is collected for purposes of administering the Personal Income Tax law and under the authority of Title 22 of the California Code of Regulations and the Revenue and Taxation Code, including Section 18624. The Information Practices Act of 1977 requires that individuals be notified of how information they provide may be used. Further information is contained in the instructions that came with your last California income tax return.



## Acalanes Union High School District

Human Resources

1212 Pleasant Hill Road, Lafayette, CA 94549

925-280-3900 ♦ Fax 925-280-4282

### TUBERCULOSIS SCREENING

All employees must either provide a copy of a current negative TB test (taken within the past 60 days) or get tested immediately upon employment. ***Failure to provide a current TB test will result in employee being placed on leave without pay until proof is provided to the Human Resources Department.***

You may choose to use your own doctor or call Centers for Occupational Medicine, 2231 Galaxy Court, Concord, 94520, 925-685-7744 or Muir Diablo, 1981 N. Broadway, Walnut Creek, 925-932-7715 . You are responsible for the cost of the test.

If you have had a positive TB test, you will need to have a chest x-ray. This can be done through your own doctor or at Centers for Occupational Medicine at your own expense.

Please provide our Human Resources Department with verification of TB clearance before start of employment.

*We educate every student to excel and contribute in a global society*



## NOTICE OF EXCLUSION FROM CalPERS MEMBERSHIP

|                                                                                                                                                                             |                                                                                                                                                                                                          |                                   |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|--|
| 1. SOCIAL SECURITY NUMBER                                                                                                                                                   | Your employer has contracted with the California Public Employees' Retirement System (CalPERS) to provide an employee benefit package which includes service retirement, death, and disability benefits. |                                   |  |
| 2. CURRENT NAME (LAST)                                                                                                                                                      | (FIRST)                                                                                                                                                                                                  | (MIDDLE)                          |  |
| 3. NAME OF PUBLIC AGENCY                                                                                                                                                    | 4. DEPARTMENT OR SCHOOL DISTRICT                                                                                                                                                                         | 5. JOB OR POSITION TITLE          |  |
| 6. TERM OF APPOINTMENT<br><input type="checkbox"/> PERMANENT <input type="checkbox"/> TEMPORARY                                                                             | 7. IF TEMPORARY, ENTER NEAREST NUMBER OF WHOLE MONTHS THE APPOINTMENT IS EXPECTED TO LAST.<br><br>MONTHS                                                                                                 | 8. APPOINTMENT DATE<br>MM DD YYYY |  |
| 9. TIME BASE<br><input type="checkbox"/> FULL-TIME <input type="checkbox"/> INDETERMINATE <input type="checkbox"/> PART-TIME IF PART TIME, ENTER THE FRACTION OF FULL TIME: |                                                                                                                                                                                                          |                                   |  |

***In your present position with this agency, you are excluded from CalPERS membership because:***

- ☐ 1. Your full-time seasonal or limited term appointment is limited to 6 months or less.
- ☐ 2. Your part-time appointment is limited to less than an average of 20 hours per week for less than one year.
- ☐ 3. Your appointment is an on-call, intermittent, emergency, substitute, or other irregular basis which excludes you from membership until you have worked 1,000 hours (or 125 days if paid on per diem basis) this fiscal year.
- ☐ 4. Your position is excluded by law or by contract agreement which excludes:  
\_\_\_\_\_ Enter contract exclusion (for Public Agencies only).
- ☐ 5. You are an independent contractor.
- ☐ 6. You are employed to render professional legal service to a city.  
Exceptions: Persons holding the office of city attorney, deputy city attorney, or assistant city attorney.
- ☐ 7. You are employed as a student aide by a school district in a position established for students only and you are attending school in the same district (for County Schools only).

**NOTE:** If you are a member of CalPERS by previous employment (either you have funds on deposit or service credit), exclusions 1, 2, and 3 do not apply to you and you should be a member in your present position. Be sure to notify your employer to complete a (PERS-1) Member Action Request Form or appoint via ACES to report your employment to CalPERS.

**If you believe that your employment does qualify you for CalPERS membership, ask your employer for an explanation. If you still have doubts, you may appeal directly to CalPERS by sending a letter to the Actuarial & Employer Services Branch, Membership Analysis & Design Unit, P.O. Box 942709, Sacramento, CA 94229-2709, stating the reasons why you feel you should be a member.**

|                                 |       |      |
|---------------------------------|-------|------|
| SIGNATURE OF CERTIFYING OFFICER | TITLE | DATE |
| SIGNATURE OF EMPLOYEE           |       | DATE |

**NOTE: Benefits provided by CalPERS are described in the "CalPERS Benefits" information booklet available from your employer.**



## **RETIREMENT SYSTEM ELECTION**

**Read the attached instructions and information for retirement system coverage before completing the Retirement System Election. Keep a copy of the instructions and information sheet for your records. Please use a black ink pen or download and print the form.**

### **TELEPHONE NUMBERS:**

TOLL FREE 1-800-228-5453

### **MAILING ADDRESS:**

CalSTRS  
MAIL STATION #16  
P.O. BOX 15275  
SACRAMENTO, CA 95851-0275

## **INSTRUCTIONS AND INFORMATION FOR RETIREMENT SYSTEM ELECTION**

The following instructions are to assist you and your employer in completing the Retirement System Election (Form # ES 372). The first section of the form must be completed by you with assistance from your employer. Please complete all entries above the Employer Certification section. By signing this document, you understand it is a crime to fail to disclose a material fact or to make any knowingly false material statements for the purpose of altering a benefit administered by CalSTRS and it may result in up to one year in jail and a fine of up to \$5,000. Ed. Code §22010

### **EMPLOYEE INSTRUCTIONS**

- I. Press firmly and print clearly with **DARK INK**, or type all information requested. Do not use light colors of ink, pencil, felt pen, or erasable ink.
- II. If you should make a mistake on the Retirement System Election form, line through the error and initial.
- III. Enter your full name, last four digits of your Social Security Number, effective date of the change in employment status and position type.
- IV. **EFFECTIVE DATE** is the first date that service was or will be performed in the new position.
- V. **RETIREMENT SYSTEM COVERAGE** If you are a member of CalSTRS and have accepted employment to perform service that requires membership in CalPERS, enter an "X" in the box next to the coverage you elect. If you are a member of CalPERS and have accepted employment to perform service that requires membership in CalSTRS, enter an "X" in the box next to the coverage you elect.
- VI. **EMPLOYEE SIGNATURE** Sign and date the Retirement System Election form.
- VII. **SUBMIT** the Retirement System Election form to your employer. Retain a copy for your records.

For further information, you may contact our office toll Free **1-800-228-5453**, or by writing us at the address on the cover page.

Should you find it necessary to contact us, your correspondence should include the last four digits of your Social Security number, full name, address, and daytime telephone number.

### **EMPLOYER INSTRUCTIONS**

Please complete the EMPLOYER CERTIFICATION only after the employee has completed the required employee information. Employees must qualify for membership before they can elect.

**CO/DIST CODE/STATE DEPARTMENT** – Enter the appropriate county and district codes. Example: Kern County, Edison Elementary would be 15-012, CA Department of Education 59-174.

**EMPLOYER CERTIFICATION** – Print official's name, title and phone number, sign and date the Retirement System Election form.

**SUBMIT** the completed Retirement System Election form to the County Office of Education or if you represent a state department, send it directly to CalSTRS and send a copy to CalPERS.

### **COUNTY OFFICE OF EDUCATION**

Review, sign and date the Retirement System Election form.

Mail the original Retirement System Election form to the retirement system elected by the employee and a copy to the retirement system that would normally cover the service. Provide copies for the employer, employee and employee's file.

## INFORMATION

A member of the CalSTRS Defined Benefit Program who becomes employed by a school district, a community college district, a county superintendent of schools or limited state departments to perform service that requires membership by the California Public Employees' Retirement System (CalPERS) [Education Code section 22508(a)] may elect to receive credit under the CalSTRS Defined Benefit Program for such service by submitting a Retirement System Election form to CalSTRS, within 60 days of the effective date of employment in the position requiring membership in the other system. If the CalSTRS member does not elect to continue as a member of CalSTRS, all service subject to coverage by CalPERS will be reported to that retirement system. (Education Code 22508)

A member of CalPERS who was employed by a school employer, Board of Governors of California Community Colleges, or State Department of Education or has at least five years of CalPERS credited service and who accepts employment to perform creditable service that requires membership by the CalSTRS Defined Benefit Program [Government Code section 20309 (a)] may elect to receive credit under CalPERS for such service by submitting a Retirement System Election form to CalPERS, within 60 days of the effective date of employment in the position requiring membership in the other system. If the CalPERS member does not elect to continue as a member of CalPERS, all CalSTRS creditable service will be reported to CalSTRS. (Government Code 20309)

**RETIREMENT SYSTEM ELECTION**  
**ES 372 (05/09)**

|                                                                                                                           |                         |
|---------------------------------------------------------------------------------------------------------------------------|-------------------------|
| <b>PLEASE READ THE ATTACHED INSTRUCTIONS<br/>BEFORE COMPLETING THIS FORM<br/>PLEASE TYPE OR PRINT LEGIBLY IN DARK INK</b> | <b>CalSTRS USE ONLY</b> |
|---------------------------------------------------------------------------------------------------------------------------|-------------------------|

**TO BE COMPLETED BY EMPLOYEE**

|              |         |           |                                            |
|--------------|---------|-----------|--------------------------------------------|
| Name: (Last) | (First) | (Initial) | Social Security Number: (last four digits) |
|--------------|---------|-----------|--------------------------------------------|

|                            |                                                                                                                  |
|----------------------------|------------------------------------------------------------------------------------------------------------------|
| EFFECTIVE DATE (Mo/Day/Yr) | POSITION TITLE                                                                                                   |
|                            | <input type="checkbox"/> Credentialed <input type="checkbox"/> Classified <input type="checkbox"/> State Service |

Employment in the California public school system is generally subject to coverage by either the California State Teachers' Retirement System (CalSTRS) or the California Public Employees' Retirement System (CalPERS). Employment in a position to perform "**creditable service**," as defined in Education Code Section 22119.5, is usually credited in CalSTRS, while **classified** (non-certificated) employment is usually credited in CalPERS.

A member of CalSTRS who becomes employed by the same or a different school district, a community college district, a county superintendent of schools or limited state employment, as defined in Education Code Section 22508, to perform service that requires membership in CalPERS will have that service credited with CalPERS unless he/she files a written election (within 60 days from the date of hire in the new position) to have the service credited with CalSTRS.

A member of CalPERS who is employed by a school employer, Board of Governors of Community College Districts or State Department of Education or has at least five years of CalPERS credited service, as defined in Government Code Section 20309, and who subsequently becomes employed to perform creditable service that requires membership in CalSTRS, will have that service credited with CalSTRS unless he/she files a written election (within 60 days of the date of hire in the new position) to have the service credited with CalPERS.

**You are a member of CalSTRS** who has accepted employment to perform service that requires membership in CalPERS but you may elect to continue retirement system coverage under CalSTRS. Please enter an "X" in the box next to the coverage you elect.

☐ CALIF STATE TEACHERS' RETIREMENT SYSTEM  
☐ CALIF PUBLIC EMPLOYEES' RETIREMENT SYSTEM \*

**OR**

**You are a member of CalPERS** who has accepted employment to perform service that requires membership in CalSTRS but you may elect to continue coverage under CalPERS. Please enter an "X" in the box next to the coverage you elect.

☐ CALIF PUBLIC EMPLOYEES' RETIREMENT SYSTEM \*  
☐ CALIF STATE TEACHERS' RETIREMENT SYSTEM

*I fully understand that this election is irrevocable for this employer.*

|                                                                                            |                            |
|--------------------------------------------------------------------------------------------|----------------------------|
| <b>EMPLOYEE SIGNATURE</b>                                                                  | <b>DATE</b>                |
|                                                                                            |                            |
| <b>EMPLOYER CERTIFICATION</b>                                                              |                            |
| I certify that the employee meets the qualifications to make a retirement system election. |                            |
| CO/DIST/STATE DEPT NAME                                                                    | CO/DIST CODE OR STATE DEPT |
| SCHOOL/STATE OFFICIAL'S NAME and PHONE NUMBER                                              | TITLE                      |
| <b>SIGNATURE OF SCHOOL/STATE OFFICIAL</b>                                                  | <b>DATE</b>                |
|                                                                                            |                            |
| COUNTY OFFICIAL'S NAME and PHONE NUMBER                                                    | TITLE                      |
| <b>SIGNATURE OF COUNTY OFFICIAL</b>                                                        | <b>DATE</b>                |
|                                                                                            |                            |

\*CalPERS Employer Code:



ES0372



# Acalanes Union High School District

1212 Pleasant Hill Road • Lafayette, California 94549

Department of Human Resources

925-280-3900 x-6622 • Fax 925-280-4282

## OATH OF ALLEGIANCE FOR PERSONS EMPLOYED BY A SCHOOL DISTRICT OF THE STATE OF CALIFORNIA

(Required by Chapter 8, Division 4, Title 1 of Government Code)

State of California                    ) ss  
County of Contra Costa            )

I, \_\_\_\_\_, do solemnly swear (or affirm)  
that I will support and defend the Constitution of the United States and the Constitution  
of the State of California against all enemies, foreign and domestic; that I will bear true  
faith and allegiance to the Constitution of the State of California; that I take this  
obligation freely, without any mental reservation or purpose of evasion; and that I will  
well and faithfully discharge the duties upon which I am about to enter.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date

I, \_\_\_\_\_, cannot sign this Loyalty Oath  
on the basis that a central tenet of my religion prohibits me from subscribing to the Oath.

Subscribed and sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

\_\_\_\_\_  
Signature of Witness

\_\_\_\_\_  
Title

---

***We educate every student to excel and contribute in a global society.***

## **Use of Social Media**

### **AUHSD Guidelines for the use of Social Media**

Social media sites offer the potential to establish communication between persons and organizations that would normally be inaccessible otherwise. Social media sites can be venues to share knowledge, express creativity, and establish working relationships with individuals in various fields. Social media sites have grown in use by parents, educators, and students, and are a useful tool in a learning environment if properly utilized. However, the use of social media also presents certain risks and carries with it certain responsibilities.

While the use of social media sites has become commonplace, it is important that you remember to conduct yourself in an appropriate manner to avoid any unintended situations that may adversely affect your professional standing with the District. Ultimately, you are solely responsible for what you post online. Before creating online content, consider the risks and rewards that are involved. Keep in mind that any of your social media conduct that adversely affects you or your fellow employees or otherwise adversely affects AUHSD may result in disciplinary action.

These guidelines, along with BP/AR/E 4040 – Employee Use of Technology, will support you with your use of social networking sites in a way that protects your reputation (private and professional), follows state laws and District policies, and abides by the code of conduct for teachers set forth by the California Commission for Teacher Credentialing.

#### **1. View all content posted to the Internet as forever**

Think twice about what you post because privacy does not exist on the Internet. Once you post information, pictures, or content to the Internet, it becomes a public document and as such can be captured, copied, archived, or retained by millions of users. Such comments, pictures, or postings can be used out of context and without your permission.

#### **2. What you do personally on the Internet affects you**

Anytime you post online, you are at risk of affecting your professional career whether you intend to or not. If you would not say something in the presence of someone else (for example a parent, another teacher, administrator, or community member), consider whether to post it online and do not expect any greater privacy online.

#### **3. Never pretend to be someone else on the Internet**

Because the Internet can give users a false sense of anonymity, some users will write things that they would not say in person. Tracking tools enable supposedly anonymous posts to be traced back to the author. Whenever you post to the Internet, you need to follow the same professional standards you would in real life.

#### **4. What you personally post does not shield you from violations of policy or law**

If you post inappropriate, unethical, or illegal content, you will be responsible for the repercussions from such posts or content. You are responsible for ensuring any photos posted adhere to privacy laws. Posting of information considered proprietary, copyrighted, defamatory, libelous, or obscene (as defined by CIPA and NCIPA) is in violation of district, state and federal laws.

### **5. Communication with current students using personal social media sites**

It could be viewed as inappropriate for District employees to communicate with current students enrolled in the District on any personal social networking site. This includes becoming “friends” or allowing students to access your personal page to communicate. Employees should refrain from creating personal social media sites that encourage social interaction with current students enrolled in the District.

### **6. Personal access of social media sites during the workday**

During the workday, employees should refrain from participating on any social networking Web site for personal reasons.

### **7. Creating social media sites**

When creating a social media site, for district/school use, prior authorization from administration must be obtained. Always identify yourself as a representative of the Acalanes Union High School District. Misrepresentation or false information could lead to disciplinary action. Employees should notify parents of their intention to use this media to communicate with the student and the intended purpose of such communications. All ethical expectations for appropriate employee/student relationships should be followed.

### **8. The use of personal email addresses**

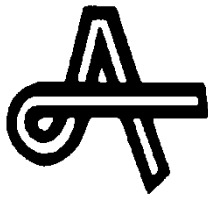
Employees should only provide their official District email address as a way to communicate with students or parents regarding District and/or school related business.

### **9. Texting**

Electronic communications with students should be through district email and/or district sponsored platforms. Texting should only be used for the purpose of communicating information directly related to school business.

### **10. Be Respectful**

Understand that social media sites can encourage opposing viewpoints and discussion. Respond in a way that reflects well on the reputation and image of the District. All online communication should be considered a matter of public record and should be made with careful consideration of word choice, tone, grammar, and subject matter that models high professional standards.



# calanes Union High School District

1212 Pleasant Hill Road • Lafayette, California 94549

Human Resources

925-280-3900 ext. 6621 • Fax 925-280-4282

## DRUG AND ALCOHOL-FREE WORKPLACE NOTICE TO EMPLOYEES

YOU ARE HEREBY NOTIFIED that it is a violation of Board policy for any employee at a school district workplace to unlawfully manufacture, distribute, dispense, possess, use or be under the influence of any alcoholic beverage, drug or controlled substance as defined in the Controlled Substances Act and Code of Federal Regulations.

"School district workplace" is defined as any place where school district work is performed, including a school building or other school premises; any school-owned or school-approved vehicle used to transport students to and from school or school activities; any off-school sites when accommodating a school-sponsored or school-approved activity or function, such as a field trip or athletic event, where students are under district jurisdiction; or during any period of time when an employee is supervising students on behalf of the district or otherwise engaged in district business.

As a condition of your continued employment with the district, you will comply with the district's policy on Drug and Alcohol-Free Workplace and will, any time you are convicted of any criminal drug or alcohol statute violation occurring in the workplace, notify your supervisor of this conviction no later than five days after such conviction.

Pursuant to California Education Code 44836 and 45123, the Governing Board may not employ or retain in employment persons convicted of a controlled substance offense as defined in Education Code 44011. If any such conviction is reversed and the person acquitted in a new trial or the charges dismissed, his/her employment is no longer prohibited.

Pursuant to Education Code 45123, the district may employ for classified service a person who has been convicted of a controlled substance offense only if it determines, from evidence presented, that the person has been rehabilitated for at least five years. The Board shall determine the type and manner of presentation of the evidence, and the Board's determination as to whether or not the person has been rehabilitated is final.

Pursuant to Education Code 44425, whenever the holder of any credential issued by the State Board of Education or the Commission for Teacher Preparation and Licensing has been convicted of a controlled substance offense as defined in Education Code 44011, the commission shall forthwith suspend the credential.

Pursuant to Education Code 44065, the district may not employ non-certificated persons in positions requiring a certificate. When the conviction becomes final or when imposition of sentence is suspended, the commission shall revoke the credential. (Education Code 44425)

Pursuant to Education Code 44940 and 45304, the district must immediately place on compulsory leave of absence any employee charged with involvement in the sale, use or exchange to minors of certain controlled substances.

Pursuant to Education Code 44940 and 45304, the district may immediately place on compulsory leave of absence any employee charged with certain controlled substance offenses.

Policy ACALANES UNION HIGH SCHOOL DISTRICT  
Adopted: February 2, 1999 Lafayette, California  
Revised: December 11, 2002

## TIME OF HIRE PAMPHLET

This pamphlet, or a similar one that has been approved by the Administrative Director, must be given to all newly hired employees in the State of California. Employers and claims administrators may use the content of this document and put their logos and additional information on it. The content of this pamphlet applies to all industrial injuries that occur on or after January 1, 2013.

## WHAT IS WORKERS' COMPENSATION?

If you get hurt on the job, your employer is required by law to pay for workers' compensation benefits. You could get hurt by:

One event at work. Examples: hurting your back in a fall, getting burned by a chemical that splashes on your skin, getting hurt in a car accident while making deliveries.

—or—

Repeated exposures at work. Examples: hurting your wrist from using vibrating tools, losing your hearing because of constant loud noise.

—or—

Workplace crime. Examples: you get hurt in a store robbery, physically attacked by an unhappy customer.

### Discrimination is illegal

It is illegal under Labor Code section 132a for your employer to punish or fire you because you:

- File a workers' compensation claim
- Intend to file a workers' compensation claim
- Settle a workers' compensation claim
- Testify or intend to testify for another injured worker.

If it is found that your employer discriminated against you, he or she may be ordered to return you to your job. Your employer may also be made to pay for lost wages, increased workers' compensation benefits, and costs and expenses set by state law.

## WHAT ARE THE BENEFITS?

- **Medical care:** Paid for by your employer to help you recover from an injury or illness caused by work. Doctor visits, hospital services, physical therapy, lab tests and x-rays are some of the medical services that may be provided. These services should be necessary to treat your injury. There are limits on some services such as physical and occupational therapy and chiropractic care.

- **Temporary disability benefits:** Payments if you lose wages because your injury prevents you from doing your usual job while recovering. The amount you may get is up to two-thirds of your wages. There are minimum and maximum payment limits set by state law. You will be paid every two weeks if you are eligible. For most injuries, payments may not exceed 104 weeks within five years from your date of injury. Temporary disability (TD) stops when you return to work, or when the doctor releases you for work, or says your injury has improved as much as it's going to.
- **Permanent disability benefits:** Payments if you don't recover completely. You will be paid every two weeks if you are eligible. There are minimum and maximum weekly payment rates established by state law. The amount of payment is based on:
  - Your doctor's medical reports
  - Your age
  - Your occupation
- **Supplemental job displacement benefits:** This is a voucher for up to \$6,000 that you can use for retraining or skill enhancement at an approved school, books, tools, licenses or certification fees, or other resources to help you find a new job. You are eligible for this voucher if:
  - You have a permanent disability.
  - Your employer does not offer regular, modified, or alternative work, within 60 days after the claims administrator receives a doctor's report saying you have made a maximum medical recovery.
- **Death benefits:** Payments to your spouse, children or other dependents if you die from a job injury or illness. The amount of payment is based on the number of dependents. The benefit is paid every two weeks at a rate of at least \$224 per week. In addition, workers' compensation provides a burial allowance.

### **OTHER BENEFITS**

You may file a claim with the Employment Development Department (EDD) to get state disability benefits when workers' compensation benefits are delayed, denied, or have ended. There are time restrictions so for more information contact the local office of EDD or go to their web site [www.edd.ca.gov](http://www.edd.ca.gov).

If your injury results in a permanent disability (PD) and the state determines that your PD benefit is disproportionately low compared to your earning loss, you may qualify for additional money from the Department of Industrial Relation's special earnings loss supplement program also



known as the return to work program. If you have questions or think you qualify, contact the Information & Assistance Unit by going to [www.dwc.ca.gov](http://www.dwc.ca.gov) and looking under “Workers’ Compensation programs and units” for the “Information & Assistance Unit” link or visit the DIR web site at [www.dir.ca.gov](http://www.dir.ca.gov).

#### **Workers’ compensation fraud is a crime**

Any person who makes or causes to be made any knowingly false statement in order to obtain or deny workers’ compensation benefits or payments is guilty of a felony. If convicted, the person will have to pay fines up to \$150,000 and/or serve up to five years in jail.

#### **WHAT SHOULD I DO IF I HAVE AN INJURY?**

##### **Report your injury to your employer**

Tell your supervisor right away no matter how slight the injury may be. Don’t delay – there are time limits. You could lose your right to benefits if your employer does not learn of your injury within 30 days. If your injury or illness is one that develops over time, report it as soon as you learn it was caused by your job.

If you cannot report to the employer or don’t hear from the claims administrator after you have reported your injury, contact the claims administrator yourself.

**Workers’ compensation insurance company or if employer is self-insured, person responsible for handling the claim is:**

**Contra Costa County Schools Insurance Group**

**Address: 550 Ellinwood Way, Pleasant Hill CA 94523**

**Phone: 1-866.922.2744**

**Workers’ Compensation Certificate of Consent to Self-Insure – 5508 effective March 1 1993.**

You may be able to find the name of your employer’s workers’ compensation insurer at [www.caworkcompcoverage.com](http://www.caworkcompcoverage.com). If no coverage exists or coverage has expired, contact the Division of Labor Standards Enforcement at [www.dir.ca.gov/DLSE](http://www.dir.ca.gov/DLSE) as all employees must be covered by law.

##### **Get emergency treatment if needed**

If it’s a medical emergency, go to an emergency room right away. Tell the medical provider who treats you that your injury is job related. Your employer may tell you where to go for follow up treatment.

**Emergency telephone number:** Call 911 for an ambulance, fire department or police. For non-emergency medical care, contact your employer, the workers' compensation claims administrator or go to this facility:

**Company Nurse – 1.888.375.9779 – Code: CSIG**

### **Fill out DWC 1 claim form and give it to your employer**

Your employer must give you a [DWC 1 claim form](#) within one working day after learning about your injury or illness. Complete the employee portion, sign and give it back to your employer. Your employer will then file your claim with the claims administrator. Your employer must authorize treatment within one working day of receiving the DWC 1 claim form.

If the injury is from repeated exposures, you have one year from when you realized your injury was job related to file a claim.

In either case, you may receive up to \$10,000 in employer-paid medical care until your claim is either accepted or denied. The claims administrator has up to 90 days to decide whether to accept or deny your claim. Otherwise your case is presumed payable.

Your employer or the claims administrator will send you “benefit notices” that will advise you of the status of your claim.

## **MORE ABOUT MEDICAL CARE**

### **What is a Primary Treating Physician (PTP)?**

This is the doctor with overall responsibility for treating your injury or illness. He or she may be:

- The doctor you name in writing *before* you get hurt on the job
- A doctor from the medical provider network (MPN)
- The doctor chosen by your employer during the first 30 days of injury if your employer does not have an MPN or
- The doctor you chose after the first 30 days if your employer does not have an MPN.

### **What is a Medical Provider Network (MPN)?**

An MPN is a select group of health care providers who treat injured workers. Check with your employer to see if they are using an MPN.

If you have not named a doctor before you get hurt and your employer is using an MPN, you will see an MPN doctor. After your first visit, you are free to choose another doctor from the MPN list.

## What is Predesignation?

Predesignation is when you name your regular doctor to treat you if you get hurt on the job. The doctor must be a medical doctor (M.D.), doctor of osteopathic medicine (D.O.) or a medical group with an M.D. or D.O. You must name your doctor in writing *before* you get hurt or become ill.

You may predesignate a doctor if you have health care coverage for non-work injuries and illnesses. The doctor must have:

- Treated you
- Maintained your medical history and records before your injury and
- Agreed to treat you for a work-related injury or illness before you get hurt or become ill.

You may use the “predesignation of personal physician” form included with this pamphlet. After you fill in the form, be sure to give it to your employer.

If your employer does not have an approved MPN, you may name your chiropractor or acupuncturist to treat you for work related injuries. The notice of personal chiropractor or acupuncturist must be in writing *before* you get hurt. You may use the form included in this pamphlet. After you fill in the form, be sure to give it to your employer. State law does not allow a chiropractor to continue as your treating physician after 24 visits.

## WHAT IF THERE IS A PROBLEM?

If you have a concern, speak up. Talk to your employer or the claims administrator handling your claim and try to solve the problem. If this doesn’t work, get help by trying the following:

### **Contact the Division of Workers’ Compensation (DWC) Information and Assistance (I&A) Unit**

All 24 DWC offices throughout the state provide information and assistance on rights, benefits and obligations under California's workers' compensation laws. I&A officers help resolve disputes without formal proceedings. Their goal is to get you full and timely benefits. Their services are free.

To contact the nearest I&A Unit, go to [www.dwc.ca.gov](http://www.dwc.ca.gov) and under “Workers’ Compensation programs and units”, click on “Information & Assistance Unit.” At this site you will find fact sheets, guides and information to help you.

The nearest I&A Unit is located at:

Address: **1515 Clay Street, 6<sup>th</sup> Floor, Oakland CA 94612-1519**

Phone number: **510.622.2861**

**Consult with an attorney**

Most attorneys offer one free consultation. If you decide to hire an attorney, his or her fees may be taken out of some of your benefits. For names of workers' compensation attorneys, call the State Bar of California at (415) 538-2120 or go to their website at [www.californiaspecialist.org](http://www.californiaspecialist.org). You may get a list of attorneys from your local I&A Unit or look in the yellow pages.

**Warning**

Your employer may not pay workers' compensation benefits if you get hurt in a voluntary off-duty recreational, social or athletic activity that is not part of your work-related duties.

**Additional rights**

You may also have other rights under the Americans with Disabilities Act (ADA) or the Fair Employment and Housing Act (FEHA). For additional information, contact FEHA at (800) 884-1684 or the Equal Employment Opportunity Commission (EEOC) at (800) 669-4000.

The information contained in this pamphlet conforms to the informational requirements found in Labor Code sections 3551 and 3553 and California Code of Regulation, Title 8, sections 9880 and 9883. This document is approved by the Division of Workers' Compensation administrative director.

Revised 12/20/12 and effective for dates of injuries on or after 1/1/13

## PREDESIGNATION OF PERSONAL PHYSICIAN

In the event you sustain an injury or illness related to your employment, you may be treated for such injury or illness by your personal medical doctor (M.D.), doctor of osteopathic medicine (D.O.) or medical group if:

- you have group health coverage;
- the doctor is your regular physician, who shall be either a physician who has limited his or her practice of medicine to general practice or who is a board-certified or board-eligible internist, pediatrician, obstetrician-gynecologist, or family practitioner, and has previously directed your medical treatment, and retains your medical records;
- your "personal physician" may be a medical group if it is a single corporation or partnership composed of licensed doctors of medicine or osteopathy, which operates an integrated multispecialty medical group providing comprehensive medical services predominantly for non-occupational illnesses and injuries;
- prior to the injury your doctor agrees to treat you for work injuries or illnesses;
- prior to the injury you provided your employer the following in writing: (1) notice that you want your personal doctor to treat you for a work-related injury or illness, and (2) your personal doctor's name and business address.

You may use this form to notify your employer if you wish to have your personal medical doctor or a doctor of osteopathic medicine treat you for a work-related injury or illness and the above requirements are met.

## NOTICE OF PREDESIGNATION OF PERSONAL PHYSICIAN

**Employee: Complete this section.**

To: \_\_\_\_\_ (name of employer) If I have a work-related injury or illness, I choose to be treated by:

\_\_\_\_\_  
(name of doctor)(M.D., D.O., or medical group)

\_\_\_\_\_  
(street address, city, state, ZIP)

\_\_\_\_\_  
(telephone number)

Employee Name (please print):

Employee's Address:

Employee's  
Signature \_\_\_\_\_ Date: \_\_\_\_\_

**Physician: I agree to this Predesignation:**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_  
(Physician or Designated Employee of the Physician or Medical Group)

The physician is not required to sign this form, however, if the physician or designated employee of the physician or medical group does not sign, other documentation of the physician's agreement to be predesignated will be required pursuant to Title 8, California Code of Regulations, section 9780.1(a)(3).

## NOTICE OF PERSONAL CHIROPRACTOR OR PERSONAL ACUPUNCTURIST

If your employer or your employer's insurer does not have a Medical Provider Network, you may be able to change your treating physician to your personal chiropractor or acupuncturist following a work-related injury or illness. In order to be eligible to make this change, you must give your employer the name and business address of a personal chiropractor or acupuncturist in writing prior to the injury or illness. Your claims administrator generally has the right to select your treating physician within the first 30 days after your employer knows of your injury or illness. After your claims administrator has initiated your treatment with another doctor during this period, you may then, upon request, have your treatment transferred to your personal chiropractor or acupuncturist.

You may use this form to notify your employer of your personal chiropractor or acupuncturist.

State law does not allow a chiropractor to continue as your treating physician after 24 visits.

### Your Chiropractor or Acupuncturist's Information:

---

(name of chiropractor or acupuncturist)

---

(street address, city, state, zip code)

---

(telephone number)

Employee Name **(please print)**:

---

Employee's address:

---

Employee's  
Signature \_\_\_\_\_ Date: \_\_\_\_\_